

ADD A NEW APPLICATION

Purpose: To use customer information that currently exists in the database for the purpose of processing a new intake application for a new program year or to re-enter a previously denied application.

Search			
Return to Main Menu		Search	Clear
Search Parameters			
Temporary Locator Number (TLN):	<input type="text"/>	*Service Address 1:	123 Main
Agency Control Code (ACC):	<input type="text"/>	Street type:	CIRCLE
System Locator Number (SLN):	<input type="text"/>	Unit Type:	
Document Locator Number (DLN):	<input type="text"/>	Unit Number:	<input type="text"/>
First Name:	Cher	*Service City:	Sacramento
Middle Initial:	<input type="text"/>	*Service ZIP Code:	95822
*Last Name:	Vinson	Area Code:	<input type="text"/>
Social Security Number:	<input type="text"/>	Phone:	<input type="text"/>
			<input type="checkbox"/> Message Phone
*Search Fields Required for Adding a New Customer			

How to Add a New Application:

Step by Step

1. Click on the **On-Line Data Entry** button from the Main Menu page, this will take you to the Search page.
2. Enter as much information into the search fields that you can obtain from the intake application. *Remember to search on the four required fields.*
3. Click on the **Search** Button. The fields that you searched on will be displayed in the Search Parameters section of this page. A list of possible matches will be displayed in the Customer Matches section of this page.
4. Verify that the list contains a match for the customer you are searching.

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5. Click on the **Select** button that applies to the above customer. The customer information will then be displayed in the *Programs for Selected Customer* section.

Database Matches

Find New Customer | Add New Application | Print To Screen

Search Parameters

Temporary Locator #		*Service Address 1:	123 Main
Agency Control Code		Block Type:	CIRCLE
System Locator #		Building Type:	
Document Locator #		Unit #	
First Name:		*Service City:	Sausalito
Middle Initial:		*Service ZIP Code:	94965
*Last Name:	Vinson	Area Code:	
Social Security #		Phone #	

☐ Message Phone

Programs For Selected Customer

Customer Matches

Select One	Agency Control Code	DLR	SSN	First Name	Middle Initial	Last Name	Service Address 1	Street Type	Building Type	Service Address 2	Service
<input type="button" value="Select"/>	0001	0007000000000000	072131200	APRIL	M	VINSON	25022 S 9TH	RD	APARTMENT	4	SAN JOSE
<input type="button" value="Select"/>	0001	0007000000000000	000071000	CHAR	A	VINSON	5070 MONTEREY	RD	APARTMENT	4	SAN JOSE
<input type="button" value="Select"/>	0001	0007000000000000	000000000	CECILE	S	VINSON	14025 BENDERS	RD	APARTMENT	4	SAN JOSE
<input type="button" value="Select"/>	0001	0007000000000000	000000000	CIVILIAN	M	VINSON	12455	RD	APARTMENT	4	SAN JOSE

6. Using the *Programs For Selected Customer* section, verify that the customer has not been assisted during the current program year.

Database Matches

Find New Customer | Add New Application | Print To Screen

Search Parameters

Temporary Locator #		*Service Address 1:	123 Main
Agency Control Code		Block Type:	CIRCLE
System Locator #		Unit Type:	
Document Locator #		Unit #	
First Name:	Char	*Service City:	Sausalito
Middle Initial:		*Service ZIP Code:	94965
*Last Name:	Vinson	Area Code:	
Social Security #		Phone #	

☐ Message Phone

Programs For Selected Customer

Select One	Card Status	Card Status Date	Program Year	Program	Customer Name	Application Status	Utility	Account No
<input type="button" value="Add"/>	Utility Account Credited	06/28/1999	1999	HBAP	CHAR VINSON	Completed	Electric	13P28018024

7. Click on the **Add New Application** button.

All data (e.g., name, SSN and mailing address) that exists in the database on that customer will populate into the appropriate fields on the **Add New Application** Page.



The Service Address fields will only populate on the New Application page if the information was entered on the Search Page.

At this point you can change/update the prior customer data and continue to process for a new program year or application.

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You will not be able to change the First Name, Last Name or SSN of an existing applicant when adding a new application. Changes to these fields can only be made by CSD. Contact the CSD Help Desk for assistance.

Customer Data - Add New Application															
Customer Data		Energy		Income Verification		Demographics		Comments		Deficiency Detail		Payments		Update Log	
Return To Search		Risk Dip Clicks		Save Data		Print App									
Application Identifiers				Application Status				Certification Status				Deficiency Popups			
Program		Agency Control Code		Intake Date		Service ZIP Code		SSN		NAME		HOUSEHOLD SIZE		SIGNATURE	
Document Locator Number		System Locator Number		Enter Date		Language		MAILING ADDRESS		SERVICE ADDRESS		UTILITY BILL		MISC	
				02/29/2000		Engle		DENIAL							
Customer Information															
First Name		Middle Initial		Last Name		Care Of									
ROBERTA				STEELE											
Mail Address		Mail Street Type		Mail Unit Type		Mail Unit Number									
459 JUMP		STREET		APARTMENT											
Mail City		Mail County		Mail State		Mail ZIP Code									
SACRAMENTO		SACRAMENTO		CALIFORNIA		95814									
Service Address		Service Street Type		Service Unit Type		Service Unit Number									
Service City		Service County		Service State		Service ZIP Code									
						95823									
Social Security Number		Area Code		Phone Number		Message Phone?									
569271049		408		6297733		<input type="checkbox"/> Yes									
Household Size		Monthly Income		Calculated Income											
Account Information				Account Number				Program Year				Energy Cost			
Utility Company								2000				\$0.00			
Pacific Gas & Electric															
Bill First Name		Middle Initial		Bill Last Name		Signed? (Y/N)		Energy Burden							
								0.0%							



Remember! You will use the **Add New Application** button to add a new application to an existing customer. The information (except for first/last name and SSN) from the existing customer can then be updated.



To complete the intake process, follow the steps in the previous section (5-8)- *Entering Information into the Customer Data Page*.